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February 13, 1926

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FOREIGN NEWS ON ALMONDS
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FOREIGN ALMOND MARKET FIRM - STOCKS REDUCED

Reports on the almond situation in the Mediterranean Basin received in the Department of Agriculture since the first of the year make no significant revisions in information previously reported. There are numerous indications, however, that the end of the season will find only a very small carryover of nuts on hand if stocks are not totally exhausted. The crop has been marketed rapidly in practically all sections of the Basin, as a result of the shortness of the crop in the larger producing areas. Demand slackened in some markets at the close of the year, as is usual after the holidays, but prices are reported firm in all markets, with the generally low stocks the important factor in the situation.

Presented below are summary statements of reports received during the past six weeks, some giving the most important details for minor areas not previously reported; others bringing up to date the situation in regions covered in earlier releases.

SPAIN:

The almond crop of Spain for the 1925 season is officially estimated at 99,046 short tons, according to a cable from the International Institute of Agriculture at Rome. The latest official figures for all of Spain available for comparison are those of 1922 when the almond crop amounted to 81,396 short tons. No trade estimates of the Spanish crop as a whole, are available for comparison with the official figures, but the official estimate, judging from such data as are available, in general confirms trade estimates that the crop is much larger than last year and considerably above normal, at least for post-war years. The area devoted to almond production in Spain is officially estimated at 370,846 acres.

M. Todd-Naylor, Clerk to the American Trade Commissioner at Rome, reported in the first part of January that the demand for almonds in Spanish markets continued active throughout December, the growers continuing to hold out for higher prices. A few markets were experiencing very light demand during the holiday season, but the situation with regard to stocks was enabling prices to be maintained.

Majorca: The almond crop on the Island of Majorca, according to latest trade reports received by Mr. E. A. Foley, Agriculture Commissioner at London, will amount to 50,000 to 55,000 standard bales in the shell. This compares with a previous estimate of 45,000 bales, reported by Mr. Foley. A normal crop is said to average from 40,000 to 50,000 bales. Majorcan growers are reported holding their considerably reduced stocks for full prices, in view of the short supplies remaining on the continent of Spain.

Tarragona and Malaga: The production of shelled almonds in the province of Tarragona is calculated this year at about 80 per cent of a normal crop, according to Consul Frank Henry at Barcelona. This confirms previous reports which have indicated a crop roughly about 75 per cent of normal. A December report from Consul Austin C. Brady, Malaga states that fair stocks of shelled almonds were then being held by the principal exporters in that region and that important quantities were still in the hands of producers. Prices, however, were continuing high because of the strong stock situation elsewhere.

SICILY:

The Sicilian almond market at the first of the year was firm notwithstanding a slackening demand, according to trade reports received from Agriculture Commissioner Foley. Stocks of this year's crop were firmly held by speculators who anticipated a steady and possibly higher price, as a result of the small crop and the lowness of stocks in other markets.

SMYRNA:

The almond crop in the Smyrna district in 1925, according to trade estimates reported by Consul Samuel W. Honaker at Smyrna, amounted to approximately 120,000 okes (340,000 pounds) as compared with a production of around 200,000 okes (556,000 pounds) in 1924. Smyrna merchants estimate that approximately two-thirds of the 1925 crop will be exported during the season and that about three-fourths of the anticipated exports had been made by the middle of November. Most of the Smyrna exports go to France, Italy and Great Britain.

PERSIA:

The 1925 almond crop in Persia did not exceed 16,000 short tons, as compared with a crop of about 25,000 tons in 1924, according to Consul Karl de G. MacVitty, Teheran. A large proportion of the crop is below fair in quality, a general drought being responsible both for the shortness of the crop and the inferior quality. Stocks carried over from 1924 were exhausted early in 1925.

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F.S.
AL-13

March 12, 1926

FOREIGN NEWS ON NUTS

FAVORABLE BLOSSOMING REPORTS FROM MEDITERRANEAN ALMOND DISTRICTS

Generally favorable blossoming and springlike weather in the almond growing districts of Sicily and the Bari section of southern Italy during the first week in March are reported in a cable received in the Department of Agriculture through the Department of Commerce from Trade Commissioner Livengood at Rome. Information through the same channels from the Consul General at Barcelona reports favorable conditions in several important regions of Spain. The bloom has been abundant and conditions are promising from the Tarragona district north through Catalonia to Barcelona and Gerona. The weather has also been favorable in the Balearic Islands. No information has yet been received from Valencia, Alicante or Malaga.

In southern France blossoming is said to have been prematurely advanced with the result that there is fear that frost may yet do damage. It was still too early at the time of report, however, to make any estimate of the abundance of blossoms in the French producing regions.

Storms in the Bari and Sicilian producing sections since the first of March with heavy rains, winds and some frost reported in Sicily, have caused some damage. The injury sustained is considered slight, but it is still too early to make an accurate appraisal. It should be pointed out that estimates of the coming crop this early in the season must not be taken as an accurate indication of what the crop will be as there is still plenty of opportunity for a radical change in conditions.

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March 26, 1926

F.S.
AI-14

FOREIGN NEWS ON NUTS

FAVORABLE REPORTS ON MEDITERRANEAN ALMOND CROP

The almond crop of the Bari district in Italy is progressing satisfactorily according to a cable from Mr. E. A. Foley, the American Agricultural Commissioner at London under date of March 26. There was a slight frost early in March but the damage done was insignificant. The condition of the crop in Sicily, where blossoming was fine is reported as excellent. There was some frost and snow at the beginning of March but little damage resulted. Present prospects are for a large crop. Flowering in Southern Spain is good. To date there have been no frosts or other damages. Flowering in the Balearic Islands is also good with all prospects pointing to a good crop.

Stocks of almonds are small in all of the important almond markets of the Mediterranean Basin but prices in Bari, Italy and in Sicily are reported to be declining because of slack demand.

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UNITED STATES DEPARTMENT OF AGRICULTURE
Bureau of Agricultural Economics
Washington

April 6, 1926

FOREIGN NEWS ON ALMONDS

PRODUCTION AND MARKETING OF PALESTINE ALMONDS

The Department of Agriculture of the Government of Palestine estimates the present area under almond cultivation at 7,644 acres, according to a report received in the Department of Agriculture from Consul Heizer at Jerusalem. The bulk of the orchards, 5,717 acres, are in the Southern Circle, mostly in the Jewish agricultural settlements and in certain Arab villages of the southern maritime plain. There are only 1,927 acres in the Northern Circle comprising the orchards around Hedera, south of Haifa, and those of certain Jewish settlements near the lake of Galilee.

Accurate figures of production are not obtainable according to Consul Heizer but the data available indicate that production has increased steadily since the war. The estimate for 1924-25 is approximately 678 short tons of nuts in the shell, of which 441 tons were in the Southern Circle and 237 tons in the Northern Circle. Figures on production from 1920-21 to 1923-24 as given by the Palestine Department of Agriculture are as follows:

<u>Year</u>	Production Unshelled almonds <u>short tons</u>
1920-21	481
1921-22	510
1922-23	518
1923-24	569

In 1923-24 the production estimate by the Department of Agriculture, it will be noted, was 569 short tons, but the export figure given by the Department of Customs and Trade for the year 1924 was 862 short tons. In explanation of the considerable discrepancy between production and export figures, the Director of Agriculture and Forests states that the only source of information on production is found in tithe assessments, and these assessments do not cover untaxed, private holdings, considerable areas of which are planted with almonds. The total production, therefore, was undoubtedly considerably larger than the quantities shown above.

The Palestine trade knows three grades of nuts: (1) Princess, containing single nuts with very thin shells and very sweet kernels. These nuts are grown only in small quantities, mainly in Galilee; (2) Victoria, which are mostly twin nuts with hard shells and sweet kernels; (3) Greek, which are rather dark in color with a semi-hard shell and a kernel that is not especially sweet. In the Northern Circle about 30 per cent of the 1924-25 crop of 237 tons bore the trade designation of Victoria nuts, with the remaining 70 per cent falling into the group called "Greek". Both of these classes are of somewhat inferior grade. No more detailed information is at present available as to the

kind of nuts produced or methods of grading.

Exports for 1924 by countries of destination are reported by the Palestine Department of Customs and Trade as follows:

Country	Amount	Value
	Short tons	Dollars
Egypt	510	72,540
Syria	203	32,470
Germany	96	13,035
France	24	3,355
United States	2.8	345
Other countries	25.9	4,010
Total	861.7	125,735

Exports to the United States, as declared to the United States Consulates, in 1924 amounted to 4,957 pounds as against 34,255 pounds in 1923. The price of almonds increased approximately 60 per cent in 1924 compared with the 1923 value and this, added to the high import duty on almonds in the United States, was not conducive to an expansion of the trade between Palestine and the United States.

The Palestine trade supplies only unshelled almonds. This is a handicap to developing trade in European countries which, for the most part, demand shelled nuts.

Market quotations are generally given for a mixture of Greek and Victoria nuts. This mixture is either equal parts of Greek and Victoria or at the rate of 2 parts Greek to one part Victoria. Unmixed nuts are very difficult to obtain but when this is possible the Victoria commands the higher price. The average price for the 1924-25 crop amounted to approximately \$259 per short ton or as much as the high price of the preceding season when quotations varied from \$104 to \$259 per short ton. The rise was due to increased demand brought about by the poor crops of Italy and certain other sections of the Mediterranean Basin, and a resulting decrease in exports from these countries.

The almond industry, which is coming to be of considerable importance in Palestine, has just passed through a severe crisis, says Consul Heizer. The almond groves suffered heavily from lack of care during the war, and the depreciation of Italian currency has made it almost impossible for Palestinian almond growers to compete with Italian growers during the last few years. The Italian competition has resulted in orchards having been further neglected and the entire industry has been in a state of depression. Conditions are improving in the Southern Circle at present, however, although prices remain low in the Northern Circle and few trees are planted there.

The adoption of cooperative marketing methods in recent years is credited with bringing about much of the improvement in the industry, as the commercial development of almond growing is largely due to the efforts of the Jewish colonies in Palestine. Individual trees and small groves are found in various parts of the country but the comparatively small quantities of nuts thus produced are consumed locally. Considerable numbers of trees have been scientifically planted and cultivated in the Jewish colonies on the Plain of Sharon and it is from this source that most of the increasing commercial crop is obtained.

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UNITED STATES DEPARTMENT OF AGRICULTURE
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May 8, 1926.

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AL-16

FOREIGN NEWS ON NUTS

LARGE MEDITERRANEAN ALMOND CROP INDICATED

All Mediterranean almond producing districts are now safe from frost and indications point to a large crop, according to a cable to the Department of Agriculture from Agricultural Commissioner Foley at London. The fruit has been developing satisfactorily in all districts and there has been no serious frost damage anywhere, notwithstanding some reports to the contrary. The only adverse reports so far received - cables from the International Institute of Agriculture and from Consul Nathan, at Palermo - indicate that hot winds did some damage in Sicily during the last week in April, but no details have yet arrived. Mr. Foley states that some damage from cold fogs causing fruit to drop may be expected in the Bari section until around May 15, but prospects, nevertheless, are that the crop in that region will be large, unless unforeseen developments occur.

Prices of almonds, both for prompt and future delivery, have dropped off sharply in all sections of the Basin as a result of the favorable crop outlook, and very little business is at present being done as a result. Stocks on hand, are not large but are probably somewhat above what previous reports have indicated. The carryover in Spain at the end of March was estimated at approximately 20 per cent of last year's crop, although in some markets, particularly Malaga, supplies were low. Sicilian stocks about the same time were variously estimated at from 10,000 to 25,000 bales of 220 pounds, with a figure of 15,000 to 20,000 bales most commonly reported. Bari stocks were estimated at from 30,000 to 40,000 bags of 220 pounds each.

Sicily.

Vice Consul Alexander P. Cruger at Messina reported at the end of March that although the flowering was slightly affected by early frosts, it was then predicted that this year's Sicilian crop would amount to approximately 100,000 bags of 220 pounds each of shelled nuts, provided there was no frost or other damage during April. Cable reports since that date have indicated that the weather was favorable during most of April, but Consul Nathan reported hot winds at the end of April, and the International Institute of Agriculture at Rome has just cabled that some damage to almonds resulted although nothing is yet known as to the extent. The Institute also states that cooler weather is desirable in Southern Italy for many crops.

Prices for immediate delivery, according to Consul Cruger, dropped about 10 per cent and futures around 8 per cent during the last week in March as a result of the prospects for a good crop. The consensus of opinion at the time was that prices would go still lower if climatic conditions continued favorable throughout April.

Consul Nathan at Palermo in written reports in general confirms the information forwarded by Vice Consul Cruger at Messina. Mr. Nathan states that an abundant Sicilian crop this year was predicted at the end of March. No business was being done at the end of the month and exporters were not making any advance purchases from growers.

A private report from Syracuse, forwarded by Agricultural Commissioner Foley at London states that as a whole a good average crop can be expected in Sicily. It also states that the crop will be early, as the very favorable weather has greatly advanced growth. This concern was also of the opinion that stocks in March, both in Sicily and the Bari section, would exceed demand between April and the beginning of the new season. This opinion, however, it should be noted, is not shared by the majority of reports that have been received.

A private report from Catania at the end of March stated that stocks "are certainly not large and the carryover into the new crop year will be small".

Bari.

Cable advice from Mr. Foley is to the effect that the Bari crop will be a large one this year, although no estimate was given. An estimate received through Trade Commissioner Livengood at Rome places the crop at about 400,000 bags of 220 pounds. While large, this figure is entirely reasonable considering the favorable reports to date. A crop of 400,000 bags, if realized, will be nearly a so-called full crop. An average crop for this section is said to be between 250,000 and 300,000 bags. Last year's crop of 70,000 bales was considered practically a failure.

Bari prices, according to most reports, have been very largely determining the market in the Basin as a whole during the past two months. Prices dropped sharply at the end of March and were expected to go even lower during April with favorable conditions. ^{not} It is not yet known whether the Bari section was affected by the winds reported in Sicily.

Spain.

Reports on the crop outlook in Spain are favorable on the whole, although conditions vary somewhat in different districts. The crop in the Malaga district does not appear to be as large as that of last year, which was the largest for several years. The crop in this district is somewhat irregular, some trees in certain localities bearing much more heavily than in others. Weather conditions have been on the whole favorable. Stocks at Malaga, according to Consul Brady, are low, both in the hands of exporters and farmers.

Prospects in the Balearic Islands were reported as fairly good at the end of March, and stocks of the 1925 crop were small, being estimated at 5,000 to 6,000 bales of 220 pounds.

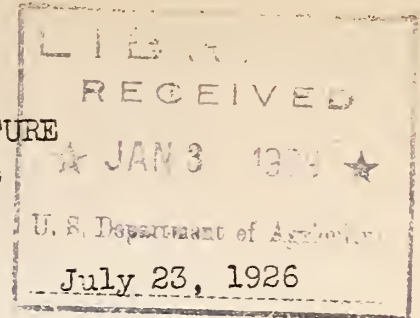
Morocco.

The crop in Morocco, according to both Consular and trade reports, is expected to be about normal this year. A trade report from Mr. Foley states that the crop is expected to be abundant and that there has been no damage by frost, whatsoever. Stocks were placed at not to exceed 100 bags at the end of March.

A report by Consul Russell at Casablanca, forwarded by Trade Commissioner Livengood at Rome, stated that at the end of March it appeared that the Haha-Chiagma and Marrakech regions would probably have a fair crop, provided that the trees were not damaged by winds during April. In the Sous district, in about half of the area, the trees are reported to have suffered from the drought of last winter and the losses are thought to be heavy. In the balance of the district, however, the situation is more favorable and the crop seems likely to be quite good, provided April conditions were satisfactory.

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FOREIGN NEWS ON NUTS
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ITALIAN ALMOND INDUSTRY

Producing districts

Of the 623,000 bales (220 lbs. each) of almonds in the shell produced in Italy during 1925, 211,000 bales are credited to the Department of Apulia and 308,000 bales to the Island of Sicily, according to the Ministry of National Economy of the Italian Government. Thus Apulia, known to the trade as the "Bari District", and Sicily together produced 83% of the Italian almond crop. In 1924, according to a report from C. A. Livengood, American Trade Commissioner at Rome, these regions produced 88% of the crop, and for a series of years Apulia and Sicily have been the source of more than 90% of the total Italian almond production.

Of the other producing regions, the Island of Sardinia and the Department of Abruzzi and Molise deserve special mention since Abruzzi and Sardinian almonds, which are of lower grade and contain a higher percentage of bitters than those of Bari or Sicily, are reported to enter the export trade mixed with the higher grades. Although the output of Sardinia in 1925 amounted to more than 9% of the Italian crop, the crop over a period of years averages less than 5% of the total production. The crop in Abruzzi averages less than 2% of the total. For practical purposes, therefore, a discussion of Italian almond production may be limited to the Bari district and to the island of Sicily.

Bari District

The almond district of Apulia is a fairly level strip of coastal land along the southeastern shores of Italy, comprising most of the Adriatic coastline southeast of the Gulf of Manfredonia. The city of Bari, with a population of 145,000 inhabitants, is the chief marketing and exporting port and the geographical center of this territory. Bari has approximately the same latitude as Mount Shasta in California, but in spite of its northern location, mountains protect it from cold north winds, and the nearby Adriatic Sea renders the climate equable and mild. As the region is poorly supplied with water for irrigation, the production of citrus fruits is not practicable. However, rainfall is sufficient for almond trees which, along with olive trees, are grown without irrigation.

The cities of Andria and Torlizzi are important as centers of production and also as the operating points of "speculators", or middlemen who buy from growers and sell to Bari exporters. Some large plantations are found in the Bari District, but the greater number are of limited size, and every degree of mingling of almonds with other trees may be seen.

Sicily

Sicily, which is formed by a continuation of the Apennine Mountain range, is rugged in topography, and the producing regions lack the homogeneity which is found in the Bari district. Along the north coast the mountain ranges are close to the shore, affording limited territory for agricultural production. This narrow belt is largely devoted to citrus crops under intensive cultivation and comparatively few almond trees are found there. Mt. Etna, on the eastern coast of Sicily and south of the main mountain range, dominates the central-eastern section back of the city of Catania, and here almond production is important. Trees are planted both along the coast and on the hills leading up to Mt. Etna.

The largest almond producing district of Sicily, however, lies in the south-central part of the island, centering in the district containing the city of Caltanissetta on the north and Girgenti and Palma on the south. Part of this region is low-lying, but the northern portion consists of hills and mountainous territory. It is in this part of Sicily that the well known Palma Girgenti almonds are most widely grown, while in the region back of Catania and adjacent to Mt. Etna is produced the grade known as "Catania" or "Etna". However, as will be shown later on when the subject of varieties is treated, that the geographical source of almonds is a secondary factor in determining their commercial grading.

The southeastern projection of Sicily is the source of the very choice almond known as "Avola". These are grown in a small region in the neighborhood of Syracuse and Avola, from the latter of which cities the name is derived.

Bari varieties

In general it may be said that the bulk of almonds produced in Italy is exported shelled, and most of the varieties produced are of the hard shelled variety. However, the Bari district produces a limited quantity of soft shells among which may be mentioned the "Mollese" and semi-soft shells, including the "Cattucce" and the "Cazzarole". A fairly regular, although comparatively small exportation of almonds in the shell to Bombay and to a lesser degree to Calcutta, India, is reported, of the type known as "hard-rounds". These grades are obtained by selecting from the general run of hard shelled Bari almonds those of fairly small size and round shape. It is stated by exporters that the "hard-rounds" are strung for necklaces and used as talismans by the natives of India.

By far the most important grade of almonds produced in the Bari district consists of what is commercially known as "Prima Bari". In assorting almonds for export, the finest kernels are selected by hand and are sold under the names "Scelta" (selected) "Sceltissima" (very selected) and so forth. Individual exporters have many private brands for these choicer grades; names of the various producing points in Bari such as Molfetta and Bisceglia being somewhat employed for this purpose. After the separation of the selected kernels, the higher grade of the remaining mass

consisting of whole kernels of good appearance, is sold as "Prima Bari", while imperfect kernels and broken pieces are removed and sold under the term "Corrente". There is a considerable production of bitter almonds throughout the Bari district which has been estimated at around 5% of the total. Almonds are from time to time shipped to Bari from Abruzzi and Sardinia as well as from Morocco for mixture with the native almonds. These grades contain a much larger percentage of bitter kernels, those of Abruzzi being reported to contain as high as 15% to 20% of bitters.

Sicilian varieties

Most Sicilian almonds, like those of Bari, are of the hard shelled varieties and are exported shelled. Among these may be mentioned the three classes well known to the trade as "Avolas", "Etnas" (or "Catantias") and "Palma Girgentis". The Avola is a separate variety, and while for export lower grade Avolas may be mixed with Etnas, the reverse is not the case. The kernel of the Avola is long, rather thin and sharp and presents a fine appearance, and this variety brings a higher price than the other Sicilian or Italian almonds. Two varieties of Avolas, the "Correntes" (or ordinary) and the "Sceltas" (or selected) are produced. As the blossoms of the trees which produce the "Sceltas" are better fertilized when mixed with other types, orchards of Avolas frequently contain alternate rows of trees of the Scelta and the Corrente varieties. Reliable figures as to the quantity of Avolas produced are not available, but a leading exporter considers that less than 15% of the Sicilian almond production is of this variety.

The Etna grade of almonds, as suggested by the name, originally came from the vicinity of Mt. Etna. Almonds are an important article of production on the south slopes of this mountain, on the east coast between Catania and Messina, especially in the region around Taormina, and in general in the section back of the port and city of Catania. The Etna, which is inferior to the Avola but superior to the Palma Girgenti, is a popular grade imported into the United States from Sicily.

While, as stated above, the Avola almonds constitute a separate variety, exporters state that the difference between Etnas and Palma Girgentis is more a matter of grading than of varieties or even of districts of production. It is true that a large part of the Palma Girgentis come from the middle-southern part of Sicily, especially the section comprising the cities of Palma and Girgenti as far east as Terranova and north to Caltanissetta. However, "Palma Girgenti" is used to designate the common run of Sicilian almonds. Selected almonds from Palma and Girgenti are sold with Etnas, and conversely the lower grades grown in the Catania district are sold as Palma Girgentis. The latter grade is allowed to contain from 1% to 2% of bitter almonds, one exporter placing the maximum at 3%. No bitters are allowed in Etna or in Avolas.

Bitter almonds

The bitter almond tree is hardier than that of the sweet varieties and many sweet varieties are grafted on bitter almond stock. A scattering

of bitter almonds is therefore found in the orchards throughout Sicily; in some cases plantations exclusively of bitter almonds were made. When prices for bitter almonds are high these are sold separately, but when they are low compared with those of other almonds, growers tend to mix them with the sweet almonds up to the percentage permitted. As they have the same appearance as other almonds, exporters determine the percentage of bitters in a lot by having samples of 100 or 300 kernels tasted. The tendency to mix bitters with sweets has been retarded by the fact that recent prices of the bitters have ruled higher than of the other common grades of almonds.

Before the war Germany was an important consumer of bitter almonds, where they are used as almond pastes for confectionery, etc., but a subsequent decrease in this demand led to the neglect of the bitter almond trees. Inquiries as to the proportion of the whole Sicilian crop represented by bitter almonds bring very little accurate information. One exporter considers 5% a fair guess but this figure was given and should be taken only as a matter of random opinion.

Soft shelled varieties

The amount of soft shelled almonds grown in Sicily is relatively unimportant compared with that of the hard shelled varieties. Of this class may be mentioned the "Mollese" grown near Niscomi in the southwest of Sicily east of Terranova. According to the trade, these are exported largely to France, where they are mixed with Aix almonds. They are exported in the shell. Some soft shelled almonds known as "Cavalliers", "Regina" and "Reginetta" are grown in the district of Palermo. The varieties known as "Betari" and "Sanguisuga" are semi-soft shelled and are exported in the shell to South America or consumed in Italy.

Percentage of kernels

Estimates vary as to the net yield of kernels from a given quantity of almonds in the shell. One leading exporter at Bari states that on an average Prima Bari almonds yield from 21% to 22% kernels depending upon the amount of moisture contained. The soft shelled varieties naturally have a larger yield, that of a variety known as "Cartucci" being stated as 33%. Another dealer in Bari states that on an average from 4.8 pounds of almonds in the shell one pound may be calculated as the normal yield of kernels. In this connection it may be noted that statistics prepared by the Italian Government pertain to almonds in the shell and the production of kernels can only be estimated by using an assumed basis of conversion.

Ports of shipment

For the Bari district the city of Bari is the chief center of exportation, and here are located the leading almond exporters of peninsular Italy. Although Syracuse, Messina and Palermo are points from which some Sicilian almonds are shipped, Catania is the nucleus of the Sicilian almond trade from a marketing standpoint; and the bulk of Sicilian almond exports are cleared from this port.

Exporting practices

Except for the selected types, almonds are exported from Italy in bags of 100 kilos (220 lbs.) each, and since they are normally sold gross for net, a minor profit accrues to the exporters from the fact that he is paid for the 6.5 pound jute bag as if this constituted that quantity of almonds. Unfortunately some importers of Bari almonds have paid more attention to the item of price than to quality. The exporter has the natural tendency to meet the price demand protecting himself, however, by adulterating the product proportionately. Among extraneous materials used for adding weight without increasing value the most important are inferior almonds such as Abruzzis, shells and water. A tolerance of one-half or three quarters of one per cent for shells may be considered as reasonably inasmuch as it is inevitable that a small amount of shell fragments will be contained in any mass of almond kernels. However, when the percentage of shells exceeds one per cent, and especially when it reaches two or three per cent it may be inferred that the exporter has intentionally adulterated his merchandise.

An even more reprehensible practice is that of sprinkling the almond kernels with water to add to their weight. According to the leading Bari exporters, this is a common practice on the part of the more unscrupulous dealers. Such methods have seriously injured the demand for Bari almonds in the American market and the honest firms are outspoken in denouncing their dishonest competitors who are, by such devices, able to quote prices below those of the honest firms. Some European buyers, especially in Germany, are said to offer no objection to the practice of mixing, being content with the lower prices thus obtained.

Owing to the bad reputation acquired by some Bari almond firms as a result of adulteration of almonds, it is reported that important quantities of Bari almonds have moved to Sicilian ports where they are mixed with, and sold as, Sicilian almonds. Sicilian exporters are understood not to have practiced mixing of kernels and water and as the Bari almonds normally are of similar quality to those grown in Sicily, the reputable methods of Sicilian exporters have enabled them to take from the Bari exporters a portion of the marketing of the Bari product.

Almond kernels are delivered to the exporter in jute bags of various sizes, but as stated above the exporter ships them in bags of 100 kilos (220 pounds) gross for net. The more select varieties are packed in cases of $12\frac{1}{2}$ kilos (27.5 pounds) each. While almonds for export are nearly always shelled, those which are stored are generally kept in the shell until required for shipment inasmuch as in this form they deteriorate less rapidly.

Mechanical devices have been utilized for cracking almonds in both Bari and Sicily but on the whole their use has been found to be impracticable partly because the machines have not operated satisfactorily, either brusing the kernels or leaving part of the shells uncracked. However, the

primary reason for the non-use of machinery for shelling almonds probably lies in the fact that labor for this purpose can be obtained at a very low rate. Women and children employed at shelling almonds are paid as low as five or six lire (20 to 24 cents) per day in the Bari district and the net expense is reduced by the fact that the shells themselves have commercial value as fuel.

Exports

In 1925, 92% by weight of total almond exports from Italy consisted of shelled, and 8% of unshelled almonds. This 8%, however, exaggerates the importance of the unshelled almond exports, since the weight of the shells is thrown into the scale. Between 1914 and 1925, exports of shelled almonds constituted less than 80% of the total in only two years, namely in 1918 and 1919. During the last five years the ratio of shelled almonds to total exports has averaged about 88%. A slight tendency toward an increase in this ratio is shown in recent years as will be shown by the following table.

Percentage by Weight of Total Italian Almond Exports represented by Shelled Almonds

1914	87%	1920	84%
1915	86%	1921	87%
1916	81%	1922	85%
1917	82%	1923	88%
1918	60%	1924	90%
1919	71%	1925	92%

In the period 1914-1926 the maximum exportation of almonds from Italy took place during 1922 when 271,223 bales of 100 kilos (220 pounds) each were exported, while the minimum export was that of 1917, when only 121,970 bales were shipped. Exports during 1922, 1923 and 1924 amounting to 271,223, 236,945 and 257,968 bales, respectively, were all higher than for any year prior to 1922 and suggest a higher level of production, although, due to a short crop, the 1925 exports fell to 172,098 bales. The range of Italian exports, both of shelled and unshelled almonds, during the last twelve calendar years is shown in the following table:

Exports of Almonds from Italy
In bales of 100 kilos (220 pounds) each

Year	:	Shelled	:	Unshelled	:	Total
	:	<u>Bales</u>	:	<u>Bales</u>	:	<u>Bales</u>
1914	:	137,755	:	20,687	:	158,442
1915	:	138,139	:	22,812	:	160,951
1916	:	121,709	:	27,975	:	149,684
1917	:	100,271	:	21,699	:	121,970
1918	:	99,303	:	67,459	:	166,762
1919	:	157,557	:	64,225	:	221,780
1920	:	144,096	:	26,604	:	170,700
1921	:	149,265	:	21,508	:	170,773
1922	:	229,425	:	41,798	:	271,223
1923	:	208,717	:	28,228	:	236,945
1924	:	233,562	:	24,406	:	257,968
1925	:	159,139	:	12,959	:	172,098

Export season

Exports of almonds are of importance beginning with the month of September, but as contracts for future delivery call for heavy shipments between the first and twentieth of October, the October exportations are by far the heaviest of the year. November is normally second in amount of almond shipments. Approximately half of the year's shipments are made in the three months September, October and November. After the early demand for almonds for the fall and winter holidays, shipments generally slacken but are stimulated somewhat in the period preceding the Easter holidays. Thereafter monthly exports dwindle to a fraction of those pertaining to the fall months. In the following table, monthly exports of almonds from Italy are shown segregated by crop years.

Total Exports of Almonds from Italy by Crop Years
In bales of 100 kilos (220 pounds) each

Month	:	1922-23	:	1923-24	:	1924-25	:	1925-26
	:	<u>Bales</u>	:	<u>Bales</u>	:	<u>Bales</u>	:	<u>Bales</u>
September	:	36,438	:	17,767	:	26,453	:	13,803
October	:	56,158	:	44,820	:	78,568	:	35,298
November	:	38,686	:	31,416	:	41,627	:	27,608
December	:	18,750	:	23,212	:	20,617	:	8,725
January	:	18,281	:	22,517	:	18,659	:	11,915
February	:	17,282	:	14,770	:	15,504	:	11,795
March	:	21,060	:	13,780	:	11,841	:	9,595
April	:	17,330	:	9,122	:	7,898	:	
May	:	14,546	:	9,338	:	8,431	:	
June	:	13,383	:	7,984	:	8,772	:	
July	:	9,613	:	6,372	:	11,220	:	
August	:	8,235	:	6,820	:	4,339	:	
Total	:	269,762	:	207,918	:	253,929	:	

As might be expected from the restricted size of the last crop, exports since the beginning of the 1925 crop year have been on a much lower level than for any of the three preceding years. Thus, through February, the latest month for which official figures are available, exports of almonds since the beginning of the 1925 crop have totalled 109,144 bales, as compared with 201,428 bales for the corresponding period of the preceding year, and with 154,502 and 185,595 bales respectively for the years 1923-24 and 1922-23.

Germany and United States are the principal markets

Exportations of Italian almonds to the United States ~~was~~ greater in 1923 than to any other country, amounting to 61,207 bales or approximately 26% of the total. This decreased to 39,714 bales in 1924 and to 24,337 bales in 1925, in which year the United States took only 14% of the Italian almond exports. Germany, which ranked fifth among importers of Italian almonds in 1923, took first place in 1924 and 1925. In 1925 Germany took 60,490 bales, or 35% of the total shipments from Italy. The exportation of Italian almonds by countries of destination is given in the following table.

Exportation of Italian Almonds by Countries
In bales of 100 kilos (220 pounds) each

Destination	:	1923	:	1924	:	1925
	:	<u>Bales</u>	:	<u>Bales</u>	:	<u>Bales</u>
Austria	:	4,562	:	7,364	:	5,991
Belgium	:	1,520	:	2,955	:	1,589
Czechoslovakia .	:	8,509	:	10,161	:	7,159
Denmark	:	7,235	:	4,255	:	4,045
France	:	24,570	:	10,170	:	7,580
Germany	:	23,086	:	93,991	:	60,490
United Kingdom .	:	25,665	:	15,828	:	8,766
Norway	:	4,718	:	2,204	:	1,958
Netherlands	:	17,111	:	18,673	:	10,913
Sweden	:	11,516	:	7,441	:	7,223
Switzerland	:	9,547	:	10,084	:	6,667
India and Ceylon	:	23,783	:	17,574	:	6,849
Australia	:	4,796	:	4,571	:	7,042
Argentina	:	914	:	2,164	:	3,068
United States ..	:	61,207	:	39,714	:	24,337
Other countries.	:	8,206	:	10,819	:	8,421
<u>Total</u>	:	<u>236,945</u>	:	<u>257,968</u>	:	<u>172,098</u>

The foregoing table includes both shelled and unshelled almonds. India, France and Argentina have been important importers of unshelled almonds. The United States also imports Italian unshelled almonds, but on a small scale compared with that of shelled almonds.

Production

The following table compiled from the official reports of the Italian

Ministry of National Economy, gives the average production of almonds by departments for the ten-year period from 1915 to 1924 and the annual production for the years 1923, 1924 and 1925. These figures represent almonds in the shell.

ITALY: Production of almonds in the shell, in bales of 220 pounds

Departments	Ten-year average 1915-1924	1923	1924	1925
	Bales	Bales	Bales	Bales
Liguria	2,500	1,500	1,000	1,000
Emilia	1,500	2,000	2,000	500
Tuscany	2,000	1,500	1,500	1,500
Marches	6,000	6,500	5,500	5,500
Umbria	500	1,500	1,500	1,000
Latium	1,000	1,000	1,500	1,000
Abruzzi & Molise .	16,500	22,000	46,000	8,500
Campania	22,000	18,000	23,000	18,000
Apulia	300,000	495,000	432,000	211,000
Basilicata	3,000	2,000	4,000	500
Calabria	6,000	8,000	9,000	4,500
Sicily	644,500	465,000	733,000	308,000
Sardinia	49,500	56,000	67,000	61,000
Others	1,000	2,000	1,000	1,000
Total	1,056,000	1,082,000	1,328,000	623,000

Estimates for 1925-26 crops

Weather conditions in Sicily and Italy during the winter of 1925-26 and spring of 1926 were extremely favorable to the almond trees and an abundant blossoming was reported from all almond regions with the result that early predictions were for a bumper crop. Subsequently, frosts and heavy winds caused some damage, but weather injury on the whole has not been serious. The estimates of the 1925-26 production in the Bari district, made in the latter part of May vary from 300,000 bales of 220 pounds each of shelled almonds, made by leading exporters to the low estimate of 200,000 bales of unshelled almonds, made by the Cattedra Ambulante di Agricoltura of the Province of Bari. The exporters estimate of the Sicilian crop was 200,000 bales against a normal figure of about 150,000 bales. On the face of such wide divergence between the official estimate and the estimate of leading exporters it is obviously impossible at this stage of the crop's development to fix upon a figure which can be used with confidence. A visit to the Bari producing districts revealed the fact that while many trees are well loaded with fruit they are not in general loaded to capacity and in some parts, especially close to the sea, fruit was scarce on a good number of trees. It seems probable that a good crop, one better than that of last year, will be produced, but not a bumper crop.

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UNITED STATES DEPARTMENT OF AGRICULTURE
Bureau of Agricultural Economics
Washington

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FOREIGN NEWS ON NUTS
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NOTES ON THE EUROPEAN ALMOND SITUATION

While it is as yet too early to make a complete statement relative to the production of almonds in the Mediterranean Basin for 1926, reports Received from Mr. E. A. Foley the American Agricultural Commissioner at London and from Consular officials and the office of the American Trade Commissioner at Rome, indicate that there will be a much larger crop than last season in Italy and Sicily but a smaller one for the regions thus far reported on in Spain. No recent estimates have been received for the Balearic Islands where a normal crop averages 40,000 to 50,000 bales in the shell. The French crop is reported to be fairly good but a smaller crop is expected in Morocco and Portugal. Stocks are low in all producing countries.

Bari

The 1926 almond crop in Apulia, according to Mr. Foley, is estimated at from 300,000 to 350,000 bales of 220 lbs. each of shelled almonds. This is a very fair crop. Last year's crop amounted to only 60,000 to 70,000 bales. A full crop in Apulia is estimated at about 450,000 bales. Estimates as to stocks of the old crop in Bari range from 15,000 to 20,000 bales.

In view of the good crop prices are showing a downward tendency. Old fruit has declined in the past few weeks from lire 2100 to lire 1875 (\$68.67 to \$61.31) per bale shelled nuts and new fruit for September-October shipment from lire 1850 to lire 1750 (\$60.50 to \$57.22) per bale, first cost Bari. The first arrivals of new crop almonds were expected in Bari towards the end of August but important quantities will not be available until the middle of September.

Vice Consul A. P. Cruger at Messina under date of August 11 reports Bari prices for shelled nuts for that date as follows:

<u>Old crop</u>	<u>Satillings</u> <u>per cwt</u>	<u>Dollars</u> <u>per 100 lbs</u>
Bari almonds, Primiissima	147/6	\$52.04
Bari almonds, Prima	144	51.28
Handpicked Bari almonds, extra large, without dust, broken, shells and twins	168	36.50
Handpicked Bari almonds, current large, without dust, broken, shells and twins	158	34.33
<u>New crop</u>		
Bari almonds, Primiissima, Sept-Oct. shipment	156/6	29.66

The above quotations are in shillings per 112 lbs. gross for net, cost and freight London, net cash against documents, prompt shipment. Converted to United States currency and a 100 lb. basis according to exchange rate of August 11.

Catania

The 1926 almond crop in Sicily is placed at 175,000 to 180,000 bales of shelled almonds as compared with 150,000 bales of shelled fruit last year, says Mr. Foley. Production by varieties is as follows:

Variety	1926	1925
	<u>Bales</u>	<u>Bales</u>
Avolas	25,000 to 30,000	30,000
Palma and Girgenti	150,000	120,000
Total	175,000 to 180,000	150,000

New crop almonds were beginning to arrive on the market towards the end of August. The carryover from the 1925 crop is estimated at about 1000 bales of Avolas and from 5000 to 8000 bales of Palma and Girgenti.

Prices published in "Sicilian Industriale et Agricola" Catania, Sicily, on August 4 were as follows:

	<u>Lire</u> <u>per bale</u>	<u>Dollars</u> <u>per 100 lbs</u>
Shelled, on board Catania:		
Palma Girgenti, sweet almonds, spot	2050	\$31.50
Palma Girgenti, sweet almonds, Oct 1 - 15 delivery	1960	30.11
Shelled in Catania Warehouse:		
Sweet almonds, in bulk, spot ...	2040	31.34
Bitter almonds, in bulk, spot ..	1950	29.96
Avolas, current	2200	33.80
Avolas, selected	2300	35.34

Palermo

Considerable quantities of almonds were exported from Palermo during July, particularly to the United States and England, to fill previous contracts. Stocks are therefore very small, amounting to only about 1500 or 2000 bales, reports Mr. Foley. Quotations on old crop fruit f.o.b. Palermo range from lire 2100 to lire 2050 (\$70.35 to \$68.68) per bale. First shipment of the new crop were expected to reach Palermo around the beginning of September. Foreign buyers are awaiting lower prices. The market for new crop fruit was therefore rather quiet with prices ranging in the neighborhood of 1950 lire or \$65.32 per bale.

Valencia

The 1926 almond crop of the Valencia producing area which includes the Valencia, Alicante, Castellon and Murcia sections, is not expected to yield more than 50 per cent of last years production, says Mr. Foley. Last year's crop amounted to approximately 27,640 short tons or about 250,720 bales of 220 lbs. each, according to statistics issued by the Spanish Government. The quality of the 1926 crop, however, is reported to be generally good. Practically all of the carryover stocks were disposed of at rising prices and growers expect the market for the new crop to open at high levels.

Local quotations during May, June and July, according to a report received in the Department from Consul Clement S. Edwards at Valencia ranged as follows:

	<u>Pesetas</u> <u>per arroba</u>	<u>Dollars</u> <u>per 100 lbs</u>
Marconas	63 - 77	\$34.04 - \$41.61
Planetas	63 - 65	34.04 - 35.12
Comunas	60 - 65	32.42 - 35.12

Reus

The almond crop of the Reus district in Spain will be small due to the fact that the trees have not yet fully recovered from the long drought experienced in 1924. The quality of the fruit, however, is expected to be better than that produced in 1925. While it is still too early to make any statements as to prices for the new crop it is the general opinion that they will closely follow those quoted in Italy. Last year's crop in the Reus district amounted to approximately 84,140 bales of 220 lbs. each, according to the official report of the Spanish Government. The 1926 output is expected to be below that of 1925.

Quotations c.i.f. London on old and new crop almonds from the Reus district at the end of August were as follows:

Variety and grade	Unit	Price Range	
		Old Crop	New Crop
Almonds Shelled Larguetas ..	220 lbs	\$90.03 to \$91.25	\$85.16 to \$86.38
" " Esperanze, First	:	:	:
Quality	"	91.25 - 92.46	85.16 - 86.38
" " Esperanze, Current:	:	:	:
Quality	"	87.60 - 88.81	82.73 - 83.95
" " Comun Rondas	"	82.73 - 83.95	77.86 - 79.08
" " " Plates	"	82.73 - 83.95	77.86 - 79.08
" In Shell, Tarragona Molars	110 lbs	16.30 - 16.55	16.30 - 16.55
Hazelnuts, Shelled, Superior	220 "	58.40 - 59.61	64.48 - 65.60
" " Small "	" "	57.18 - 58.40	63.26 - 64.48
" " Current	" "	49.88 - 51.10	- - -
" In Shell, Cribbled Extra	128 "	16.30 - 16.55	17.52 - 17.76
" " " Current ...	" "	15.57 - 15.82	16.79 - 17.03
" " " Current	" "	14.60 - 14.84	16.06 - 16.30

Malaga

The 1926 almond crop in the Malaga district, which includes the regions of Granada, Jaen, Malaga and Almeria, will be 30 per cent below that of 1925, according to Mr. Foley. Last year's output in this district according to official statistics amounted to 236,300 bales of 220 lbs. each. While the crop of Valencias is reported to be very good that of the Jordans is very low.

The 1926 almond harvest and export season for the Malaga district opened unusually early this year, according to a report received in the Department from Consul R. W. Baker at Malaga. First shipments of the Jordan grade, produced almost entirely in the Provinces of Malaga, Granada and Almeria, reached the market on July 15 whereas they are usually not available for export until August 1. The Valencia variety, ordinarily not harvested before September 1, was offered in the market by producers during the first week of August. The first shipments of Jordans to be exported from Malaga this year left for England on July 21. The first consignment to the United States was made on July 28. Stocks carried over from last season are small, amounting to only about 640 bales.

The principal Malaga exporting house at the beginning of August was quoting unselected lots of new crop Jordans c.&.f. New York at \$11.90 a box of 25 lbs. and medium Jordans at \$13.95 a box of 28 lbs. Corresponding opening prices in 1925 were \$11.20 for small and \$13.25 for medium Jordans. Valencia almonds will not reach the Malaga market until some time in August, says Consul Baker but offers of 50 pesetas per arroba (\$27.91 per 100 lbs) for unselected lots as compared with 55 pesetas (\$30.70) last year were being made.

Canary Islands

The 1926 almond crop of La Palma, the principal producing Island of the Canaries, will be small as compared with 1925, according to Consul R. A. Gibson at Teneriffe under date of July 30. A smaller crop is also expected on the Island of Teneriffe. In general the 1926 crop of the Islands is estimated at from 550 to 650 short tons of cleaned almonds or practically 60 per cent of the 1925 output.

Persia

In most districts, except Shiraz, there are prospects for a very good crop during 1926 says Consul O. N. Neilsen at Teheran. Cold winds in April are reported to have left but a fraction of the young almonds in some parts of the Shiraz territory. Frequent hailstorms and much wind in the Tabriz section did some damage in May but the crop is still expected to be fairly good. Present indications are that the 1926 crop of the entire country will amount to approximately 25,350 short tons. Unseasonable coldness in the spring has retarded the crop from three to four weeks, says the Consul.

Portugal

It is believed that the 1926 Portuguese almond crop will be much smaller than that of last year, says Consul General W. Stanley Hollis at Lisbon under date of July 21. The crop is late because of unfavorable spring weather. No figures on acreage and production are available says the Consul General.

French Morocco Almonds

The 1926 almond crop of Morocco is estimated at from 3,800 to 4,400 short tons whereas a normal yield amounts to about 5,500 short tons, according to Consul H. E. Russel at Casablanca. The crop was very good in some regions but bad in others. Sections which did well last year yielded a poor crop this year and vice versa. The movement of the 1926 crop will start around the beginning of August. Almond dealers consider that the crop is from ten days to two weeks early this year. Unofficial estimates place the number of almond trees in the Casablanca Consular district at a little less than 1,000,000. The most important producing districts are in Southern Morocco both along the sea coast and at the foot of the Atlas range.

France

The 1926 almond crop of France will run between 20,000 and 30,000 bales of 220 lbs each, shelled basis, reports Mr. Miles Hammond, Clerk to the American Trade Commissioner at Rome, under date of August 13. The crop would have been much better if caterpillars had not been so active. The crop is advanced to an unusual degree for this time of the year and will be gathered a full month before the normal harvesting date. The normal production of France according to Consular reports is 4,410 short tons or approximately 40,000 bales, unshelled basis. The Department of Basses Alpes, Bouches du Rhone and Van Cluse produce three fourths of the normal crop.

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FOREIGN NEWS ON NUTS

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THE 1926 ALMOND CROP OF FRENCH MOROCCO

Production of almonds in French Morocco for the 1926 season is not expected to exceed 30,000 bales of 100 kilos (220.46 pounds) each, reports Consul Russell at Casablanca. Earlier estimates were for a crop of 35,000 to 40,000 bales but arrivals have not confirmed this figure and the estimate has been lowered. The quality of the 1926 crop is reported to be excellent. The old crop was exhausted before the new 1926 crop began to appear on the market so that no carryover was reported.

No estimate is made of the amount available for export since stocks are seldom kept in Morocco, arrivals of the week being sold almost immediately. Exports for the 1925-26 season or July 1925 to August 1926 are reported by the Consul as 2,465 short tons, quoting customs records for the French Morocco protectorate. Prices are maintained at a good level by the exporters since the natives, many of whom object to the paper money of the country, sell only enough almonds at a time to pay for the articles needed by them. Nuts are brought in slowly and good prices maintained.

Prices in London the middle of October had risen to \$31.40 per 100 pounds for sweet almonds and \$23.82 per 100 pounds for bitter, all quotations being "landed terms". In the local market at Casablanca on October 19 sweet almonds were quoted at \$26.49 per hundred pounds and bitters at \$19.87 per hundred pounds. All offerings are of the new crop. All nuts are exported shelled.

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